

CASE STUDY

From Excel and fragmented reports to real-time management of the leasing business

A leasing company unified sales, controlling, and forecasting into a single view with analyses available in seconds instead of days.

Analyses in
seconds

End-to-end solution
in **4 months**

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-  Slovak Republic
-  Financial Services
-  300+ employees

Use cases

-  Consolidated Controlling and Reporting
-  Sales Performance Management Based on Activities

Technologies used

Qlik

Problem

ČSOB Leasing had long faced a growing need to manage sales activities based on current and reliable data. Data was scattered across several relatively isolated systems, and manually connecting it was time-consuming and difficult to scale. As a result, controlling and sales management lacked a unified view of the entire process.

Reporting existed, but it was fragmented, difficult to maintain, and unable to flexibly respond to new management questions. Any deeper analysis required exports to Excel, pivot tables, and often the involvement of external sources, which slowed down decision-making and limited the company's ability to manage sales on an ongoing basis.

Solution

We unified sales, controlling, and process data into a single analytical model that enables performance tracking and real-time business management. As a result, the company gained immediate access to analyses, better visibility into activities, and the ability to work with forecasts without relying on manual reporting.

Before

-  Data stored in several separate systems
-  Decision-making based more on results than on managing activities
-  Reporting based on manual exports and Excel
-  Limited ability to track trends and development over time

After

-  Consolidated view on a single platform
-  Sales management based on real-time data
-  Instant access to analyses and reports in seconds
-  Ability to continuously monitor trends, forecasts, and performance



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-  Slovenská republika
 -  Finanční služby
 -  300+ zaměstnanců
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Use cases

-  Konsolidovaný controlling a reporting
 -  Řízení obchodního výkonu na základě aktivit
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Použité technologie

Qlik

Solution

-  Fast user onboarding thanks to the intuitive solution interface
-  Gradual development of dashboards for management, sales, and back office
-  Design of a unified data model connecting key sales and process dimensions
-  Implementation of the solution without significantly burdening internal capacities
-  Focus on activity management and forecasting instead of waiting for final results
-  Creation of a logical data structure as a foundation for future reporting and analytics

When we run an analysis, we have the results available within a few seconds. In the past, the same view required two to three days of preparation. The time savings are therefore significant.

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Are you managing your business in real time, or waiting for reports?

We'll show you how to have both data and analytics available within seconds.



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